

Georgia[®] Department of Community Affairs

Data Quality Clean Up: Q4: Income and Sources at Exit

From the client Dashboard, click on blue button and choose Review Exit Assessments

The screenshot shows the ClientTrack 15 web application interface. The user is logged in as Captain America (8/24/2005, 406315). The dashboard displays Captain America's information and a table of enrollments. A context menu is open over the enrollment table, showing options like 'Re Enter the Enrollment', 'Add Family Member', 'View Case Members', 'Missed Annual/Update Assessment', 'Link Assessments', 'Associated Assessments', 'Exit the Enrollment', 'Review Entry Assessments', 'Review Exit Assessments' (highlighted), and 'Delete Enrollment'.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
My Training Org CoC - PSH	2	04/01/2016	05/18/2017	My Training Organization	05/18/2017	10658	10809

You will see that Financial does not have a check mark by it

The screenshot shows the 'Assessment Status' page for Captain America. It displays a table of assessments and their completion status. The 'Financial' assessment is listed but does not have a check mark in the 'Finished' column.

Assessment	Finished
HMIS Universal Data	<input checked="" type="checkbox"/>
RHY Exit Assessment	<input checked="" type="checkbox"/>
HMIS Barriers	<input checked="" type="checkbox"/>
Financial	<input type="checkbox"/>
(Prevention Only) Housing Assessment at Exit	<input type="checkbox"/>

It will be marked with something like this if it is flagging as an error

GEORGIA HOUSING AND FINANCE AUTHORITY Training - ClientTrack 15 - Google Chrome

Secure | https://west.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack- Clients All Search

GABOSTrain01 (Training) Help Hidden (1) Sign Out

Flash Gordon
12/6/1969 406314

HUD Program Exit

Exit Enrollment
Exit Assessments
Gordon, Flash
Do you want to exit?
Exit Enrollment
Exit Assessments
Barriers / Special Needs
Income

Enrollment Exit ▶ Universal Data Assessment ▶ Income and Sources, Non-Cash Benefits

Indicate below the client's sources of **monthly** income, non-cash benefits and expenses.

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be "No". As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default Last Assessment

Assessment Active

Assessment Date: 05/18/2017

Income from Any Source: Data Not Collected

Non-Cash Benefits from Any Source: No

Expenses: --SELECT--

Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Save and Close

Update assessment (with date to be actual exit date for client) to show as follows (yes or no answers depending on your client)

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Secure | https://west.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack- Clients All Search

GABOSTrain01 (Training) Help Hidden (1) Sign Out

Captain America
8/24/2005 406315

Captain America's Dashboard ▶ Assessment Status ▶ Income and Sources, Non-Cash Benefits

Indicate below the client's sources of **monthly** income, non-cash benefits and expenses.

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be "No". As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default Last Assessment

Assessment Active

Assessment Date: 05/18/2017

Income from Any Source: No

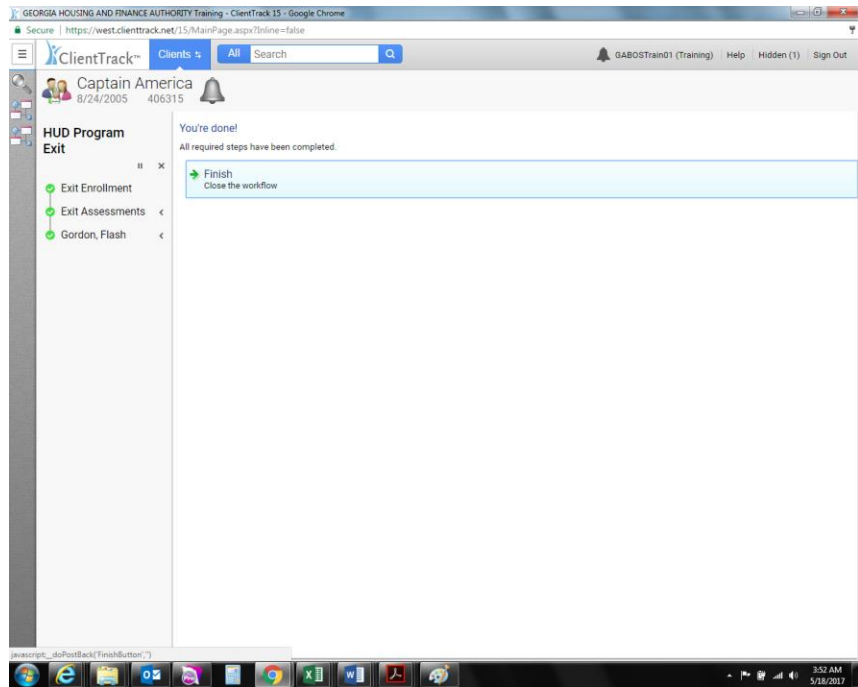
Non-Cash Benefits from Any Source: No

Expenses: --SELECT--

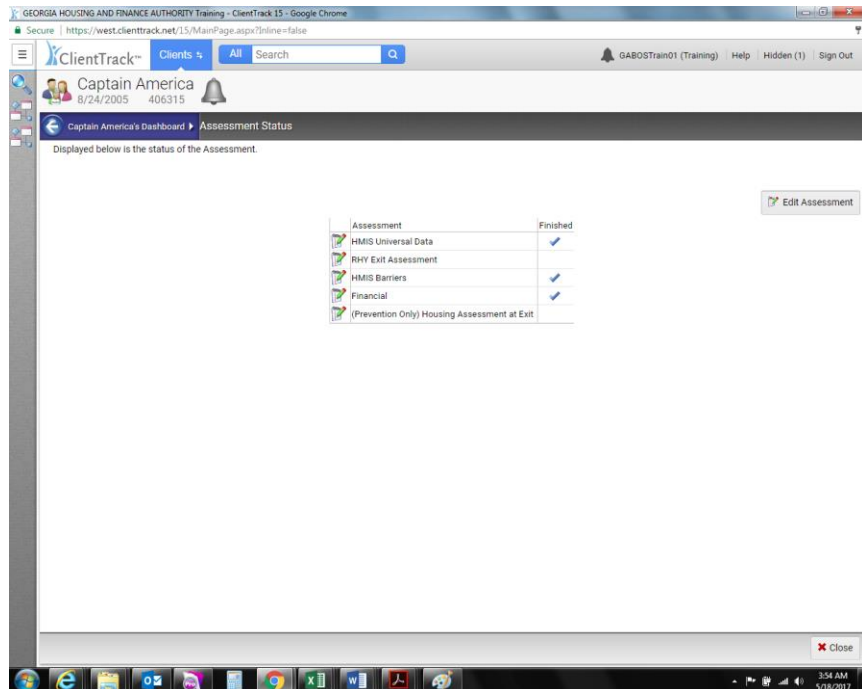
Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Save and Close Cancel

Finish the workflow to ensure record will be updated



Return to exit assessment page and confirm it is updated by checkmark next to Financial Assessment



You may then refresh your DQ report to see the error drop off from the report.